CHURCH DIRECTORY
of ORGANIZATIONS AND LEADERS

User's Manual

File   Edit   View   History   Bookmarks   Tools   Help

http://chqpvuu8656/cdol/index.jsf#   Google

Dashboard - ICS JIRA   CDOL signon   CDOL Test   CDOL UA   Church Intranet   Church Web Site   LUWS Login   Portal Test   DMBA   Webdesk (PIN)

Church Directory of Organization...

CHURCH DIRECTORY
of ORGANIZATIONS AND LEADERS

petersenga (Sign Out) · Meetinghouse Locator · Verifications · Feedback · User Manual · FAQ

Search

⦿ Organization   ○ Leader   Advanced Search

I am the good shepherd, and know my sheep, and am known of mine.

JOHN 10:14

My Church Directory   Headquarters Directory Guide   **Saved Searches**

People   My Searches

Organizations   Public Searches

Done

CDOL 2.1 Release Version

Member and Statistical Records Division
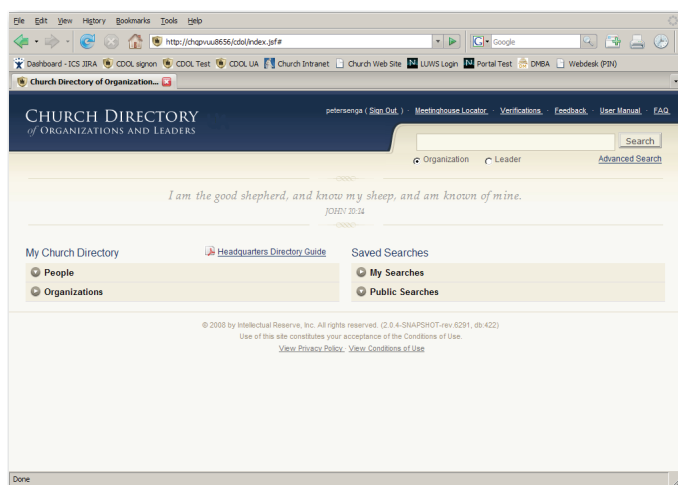## Finance and Records Department
Revised August 2008

CHURCH DIRECTORY
of ORGANIZATIONS AND LEADERS

CDOL User's Manual Contents

Purpose

The Church Directory of Organizations and Leaders (CDOL) contains information about Church organizations and leaders (ecclesiastical and temporal) throughout the world.

Authorized users of CDOL are able to perform some or all the following tasks related to Church organizations and leaders:
- View information such as names, contact information, and dates.
- Edit the information in the directory including adding positions and changing and deleting contact information.
- Print reports with user-defined parameters.

CDOL provides ways for authorized users to track and manage all existing organizations and leaders as well as allow new organizations, organization types, positions, and position types to be viewed and created.

User Privileges

Employees receive user privileges to view and edit areas of the directory based on their assigned responsibilities. Some employees may have view-only privileges. A CDOL administrator generally sets up these privileges when the manager or supervisor requests an account.

If you feel there are areas of the directory you need to access in order to perform your job and you cannot access these screens or information, contact your supervisor or manager.

Information Release

Information from CDOL is restricted to authorized users and systems. The Member and Statistical Records (MSR) Division has been designated by the First Presidency and the Presiding Bishopric as the data steward for all information maintained in CDOL.

MSR maintains a comprehensive information release policy that governs the release of information and shows who is authorized to receive it.

Employees in a position to release CDOL information can view the complete information release policy on the MSR Intranet site.

How to Use This Manual

If you use CDOL to search for organizations and leaders and do not add or update information you should focus on chapters 1-2.

Chapter 3 provides step-by-step procedures for editing organization and leader information in CDOL.

Chapter 4 provides step-by-step procedures for creating custom directories and reports. This chapter will be expanded as additional reporting capabilites are added to CDOL.

Chapter 5 provides troubleshooting tips and answers to frequently asked questions about CDOL.

- Arrows ⟶ are used throughout the manual to identify key features on CDOL screens.

- Buttons and data entry fields display in **bold text**, and special cautions display in **red text**.

- Additional information about a topic is included in a text box at the bottom of many pages or in boxes such as the following:

Don't click the **Save** button yet!

CDOL Data Entry Overview

Many Church leaders throughout the world regularly use the directory information in CDOL. It is essential that all information be accurate and up to date.
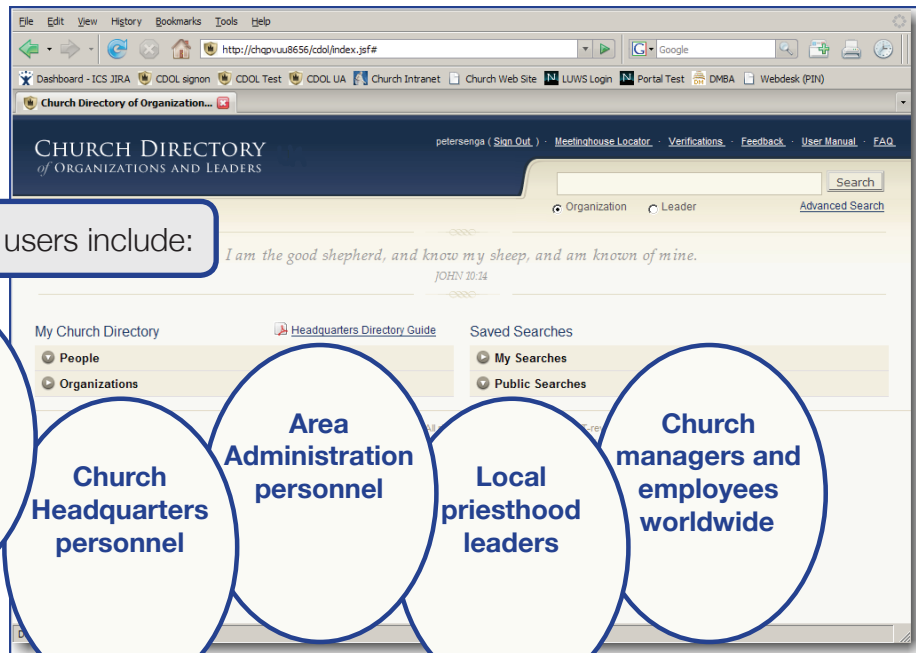

Regular directory users include:

General Authorities

Church Headquarters personnel

Area Administration personnel

Local priesthood leaders

Church managers and employees worldwide

Data entry plays a key role in making sure the directory information is accurate.

Once an organization is approved, you are responsible to:

Activate the approved organization

Enter organization information

Enter callings and other assignments in the organization

Save the new information

Did you enter accurate and up-to-date information?

If so, the information is published online in the directory within 24 hours.

For more information about data entry see Chapter 3 **Editing Information in CDOL**.

Church Directory
of Organizations and Leaders

1. Navigating in CDOL

This chapter explains how to sign in and then navigate in CDOL.

Chapter 1 Contents
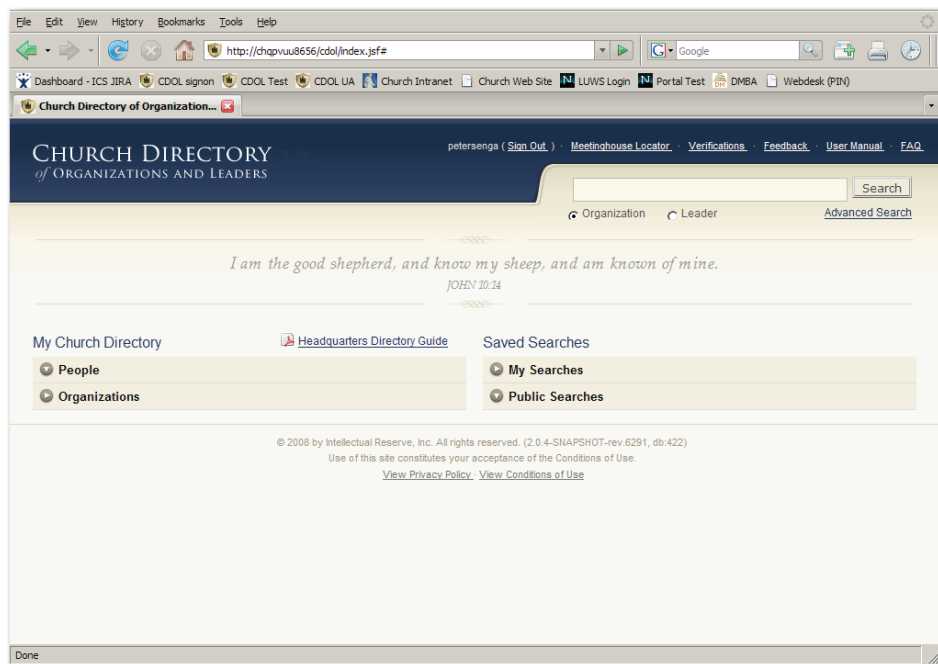
Signing in to CDOL

Follow these steps to sign in to CDOL:

1 Enter the following URL:
https://cdol.lds.org

2 Enter your LDS Account username and your password.

3 Click the **I agree, Sign-in** button. The CDOL screen appears. (If it does not appear, follow the instructions in the error message.)

Help

If you forget your username or password or need to register for an LDS Account, click on the links provided. A new screen opens where you are asked to provide some personal information.

Additional help is available from your MSR and Information and Communications Systems (ICS) staff. If you have questions, contact your manager.

Create a Favorite or Shortcut

For easier access to CDOL, create a favorite (bookmark) in your Web browser, or add a shortcut to your desktop.

Navigating in CDOL

In general, you can navigate in CDOL the same way you navigate in other Web-based programs. Please take note of the following:

• When using CDOL do not use the back or forward buttons in your Web browser. Use only the navigation tools provided within CDOL.

• At any time during your session, you may click the Church Directory logo to go to the CDOL home page.

Other options available here are based on your CDOL rights. All users have the following options or links:

• **Sign Out** from CDOL
• **Meetinghouse Locator**
• CDOL user **Feedback**
• CDOL **User Manual**
• CDOL **FAQ** (Frequently Asked Questions)
• **Headquarters Directory Guide**
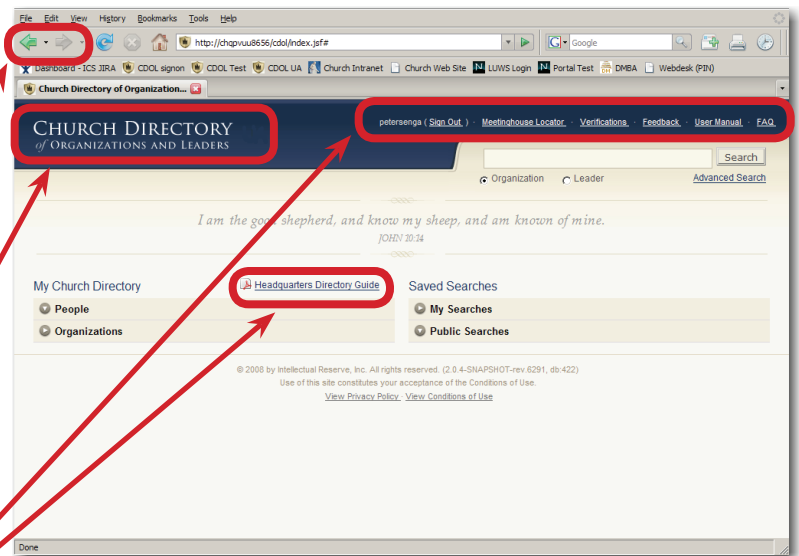
Web Browser and Links

CDOL uses your default Internet browser. New Internet standards use a mouse-over to highlight links instead of underlining links on a Web page. CDOL follows this new standard. As you move the mouse over a link, an action such as a dropdown window opening or a color change occurs.

Web Pages

CDOL is based on individual Web pages. Each time you click on a link you move to a new Web page. CDOL functions much like other Internet-based programs. However, as noted, do not use your browser's forward and back buttons to move between Web pages. Use the links provided on the CDOL screen.

When using CDOL, use these hints to save time.

- Use the **Tab** key [Tab] to move to the next field.

- When entering dates, click the calendar icon 🔲. A calendar opens showing the current month with the current date highlighted. To select a date, click on the day of the month.

- If you need to select a different month or year, use the next [>] [»] and previous [«] [<] arrows at the top of the calendar.

?	May, 2008					×
«	<	Today			>	»
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	**20**	21	22	23	24
25	26	27	28	29	30	31
		Select date				

?	May, 2008					×
«	<	Today			>	»
Sun	Mon	Tue	Wed	Thu	Fri	Sat
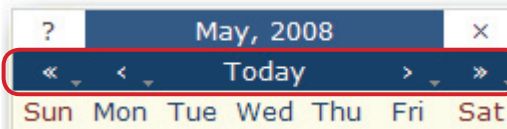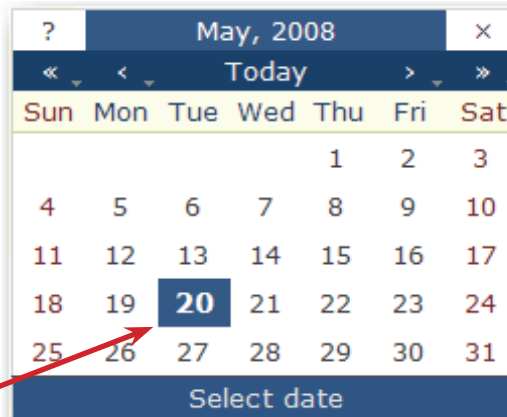
- In a dropdown list (for example, a list of countries), you can save time by typing the first character of the desired entry. This moves the selection to the first entry in the list that begins with this character.

Select a Country
Afghanistan
Albania
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Antigua and Barbuda
Argentina

- Use the Keyboard Shortcuts to make data entry easier. Click **F1** or **Ctrl+h** to display the keyboard shortcut help.

Keyboard Shortcut Help   Close

Throughout the Directory
- **F1, Ctrl+h** Display this keyboard shortcut help.
- **Ctrl+Alt+f** Change focus to organization / leader search box.

When on Organization or Assignment Summary
- **Ctrl+e** Go to the organization or assignment edit page.

When on Organization or Assignment Edit
- **Ctrl+m** Go to the organization or assignment summary page.
- **Ctrl+s** Save changes to the organization or assignment.
- **Ctrl+Down** Go to the next tab.
- **Ctrl+Up** Go to the previous tab.
- **Ctrl+1** Go to the 1st tab.
- **Ctrl+2** Go to the 2nd tab.
- **Ctrl+3** Go to the 3rd tab.
- **Ctrl+4** Go to the 4th tab.
- **Ctrl+5** Go to the 5th tab.
- **Ctrl+6** Go to the 6th tab.
- **Ctrl+7** Go to the 7th tab.
- **Ctrl+8** Go to the 8th tab.

Navigating CDOL Editing Screens

Editing screens in CDOL are arranged using a file folder metaphor with tabs across the top of the screen. Using the tabs you can edit both organization and leader information. If you have rights to make changes to or update an organization, an **Edit Organization** link appears on the organization's **View Summary** screen. An **Edit** link also appears on the **Search Results** page when you have edit rights.

Organizations

The main screen for editing organization information has nine tabs across the top of the screen. The tabs include:

- **General** - Edit the local name and e-mail addresses.
- **Addresses** - Add or update the primary and delivery locations for the organization.
- **Phone Numbers** - Add or update phone numbers for the organization.
- **Locations** - Change the time zone associated with the organization and add a new location for the organization.
- **Languages** - Displays the languages spoken in the organization and the languages used in the organization's materials.
- **Associations** - Shows the relationships between the organization and other organizations using a parent and child metaphor.
- **Assignments** - Displays assignments in the organization and lets you release a person from an assignment and add a new assignment.
- **History** - Displays historical events for the organization and lets you add a note about an upcoming change.
- **Pending Events** - Displays approved events that are ready to be implemented.

Navigating CDOL Editing Screens (continued)

If you have rights to make changes to or update leader, an **Edit Assignment** link appears on the leader's **View Summary** screen. An **Edit** link also appears on the **Search Results** page when you have edit rights.

Leaders

The main screen for editing leaders has seven tabs across the top of the screen. The tabs include:

- **Assignment** - Displays the title of the assignment (such as Bishop). Edit names, e-mail addresses, and assignment dates.
- **Ecclesiastical** - Update the leader's setting apart and ordination information.
- **Addresses** - Add or update the leader's home, mailing, and work addresses.
- **Phone Numbers** - Add or update the leader's phone numbers
- **Other Assignments** - Displays the leader's other assignments including historical assignments if you have rights to view historical data.
- **Languages** - Add an additional language the leader speaks.
- **Notes** - Add a note relating to the leader's assignment.

OK and Save

When adding or updating information in CDOL additional windows often open with data entry fields. Once you enter information in these fields, you need to click **OK** so save it. If you forget to click **OK** and only click **Save** at the bottom of the screen, the information in the additional window will be lost.

CHURCH DIRECTORY
of ORGANIZATIONS AND LEADERS

2. Searching CDOL

This chapter explains how to search for leader and organization information in CDOL.

Chapter 2 Contents

Searching for Organization Information

To search for an organization you may enter the organization's name, location, unit number, or local name in the **Search** field.

In this example, we use the organization's location. From the main CDOL screen:

1 Click the **Organization** radio button.

2 Enter the organization name or location in the **Search** field.

3 Click **Search**. The search results appear as shown. From this screen you can:
- **Refine Search** (see page 2-6)
- **Save Search As** (see page 2-7)
- **Export to File** (see page 2-8)
- **Export for Mailing Labels** (see page 4-7)
- **Make a Directory** (see page 4-4)

4 Click an organization name to see the directory information, or you can click **Edit** to edit the directory information.

When you click an organization name the **Unit Summary Page** displays. Here you can scroll to view the following directory information:
- Positions
- General Information
- Addresses and Phone Numbers
- Associated Organizations

Search Results Screen

All organizations or leaders matching your search criteria are available. By default, the **Search Results** screen displays 25 results per page. Use the Results drop-down list to change the default view to 50 or 100 results per page.

If you have rights, you can click **Edit Organization** to make changes to the organization.

Additional options include:
- **Add to My Personal Directory** (see page 2-4)
- **Create ICR**
- **Make a Directory** (see page 4-4)
- **Mailing Label** (see page 4-7)

When you enter a unit number in the **Search** field you are taken directly to the **Unit Summary Page** for the unit.
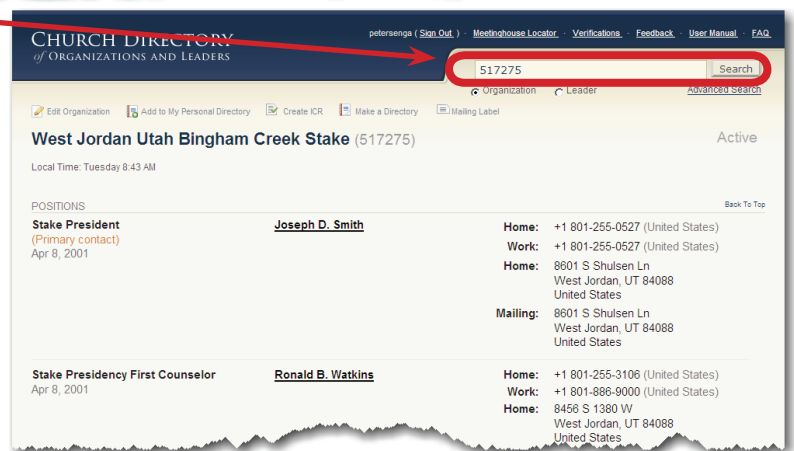
Navigating Multiple Page Search Results

When your search results in multiple pages of information, click **Next** to go to the next page, **Prev** for the previous page, **First** for the first page, and **Last** for the last page. You can then use the scroll bar to see all the information on a page.

Unit Number Searches

You should use a unit number search whenever you know the unit number. The unit number search is the most efficient way to search in CDOL. A unit number search displays the **Unit Summary Page**. From this point you can view all the unit information or click the **Edit** button to make changes to the information.

Local Names

You can also search by local name. Local names are helpful to show the organization name as it appears in the language of the unit instead of English. To create a local name, see the instructions on page 5-4 in this manual.

Adding Organizations or Leaders to My Church Directory

If you regularly view or update the information for certain organizations or leaders, you can save time by adding the organizations or leaders to **My Church Directory**. To add an organization or leader to your personal directory follow these steps.

To add an organization or leader:

1 From the **Unit Summary Page** or **Leader Summary Page** click **Add to My Personal Directory**. This automatically adds a link to the item your personal directory. **My Church Directory** displays on the main CDOL screen when you log in.

2 Click the link to go directly to that organization or leader's directory information.

Searching for Leader Information

CDOL allows you to search for leader or organization information in Church organizations worldwide to help in day-to-day Church administration.

To search for a leader you may use the leader's full name, last name, or Membership Record Number (MRN).

In this example, we use the leader's full name. From the main CDOL screen:

1 Click the **Leader** radio button.
2 Enter the leader's full name.
3 Click **Search**.

A new window opens with the leader's information.

If you have rights to view historical information, historical assignments are also displayed.

Efficient Searches

You can search for leader information by last name, but you can increase the efficiency of your searches by avoiding broad last name searches such as "Smith" in CDOL. The database is so large that if you search using a last name only, it may slow the system as it generates a results list with thousands of names.

Using the Advanced Search Option

An advanced search option is available to help you narrow a search. The example below shows how you can search for a specific organization type such as a branch and for a specific classification such as a care center unit that you need information on.

The example below shows how to create a saved search for pending units.

1 From the main CDOL screen, click **Advanced Search**.

2 Select the **Organization Type**. For example, select **Stake** and **Ward**.

3 From the **Status** *Is Currently* dropdown list, select **Pending**.

4 From the **Church Location** drop-down list select **Area**, and from the list of Areas select the Area you want.

5 Click **Search**. The **Search Results** display.

You will find this search useful for identifying pending units that you need to activate.

See page 4-2 for step-by-step procedures for using an advanced search to create a report.

Refine Search

From the **Search Results** screen you can click **Refine Search** to access the **Advanced Search** options.

Creating My Searches

When you complete a search for an organization or leader in CDOL you have the option of saving the search criteria for later use. This can save time when you regularly need to view the results of certain searches. These searches display on the main CDOL screen under **My Searches**.

6 From **Search Results** click **Save Search As**, and enter a name for the search. Your saved search appears on the **CDOL Main** screen under **Saved Searches**.
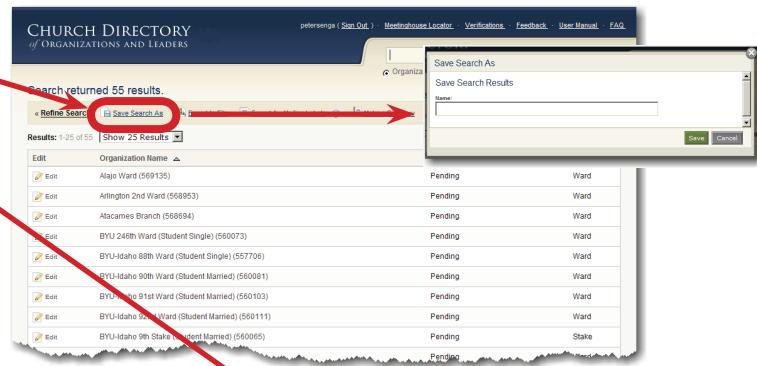
My Searches

Note that when a saved search is viewed, it shows the most current information in CDOL, not necessarily the search results displayed when the saved search was originally created.

Exporting Search Results

You can export CDOL data to a file that can be used with a spreadsheet program. To export CDOL data:

1 From the **Search Results** screen, Click **Export to File**. (A new window opens showing that your request is being processed.) Once the processing is completed, a new window appears. The window that opens depends on which browser you are using.

2 Indicate what you want to do with the file: Click **Open**, **Save**, or **Cancel**.
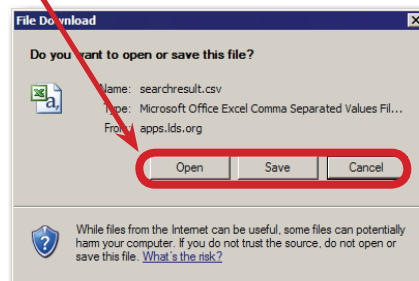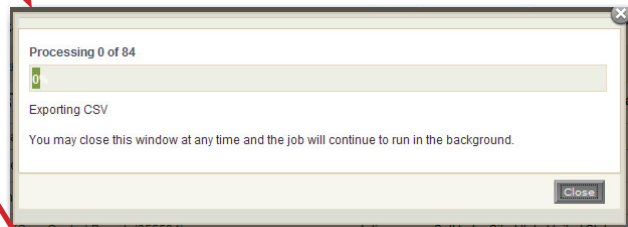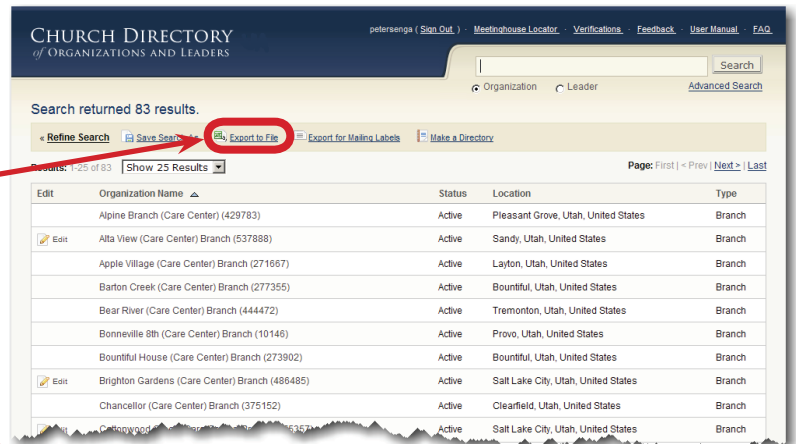
All sensitive information in the exported data appears in red text.

Caution!

Downloaded information does not get updated when CDOL data is updated. To avoid stale data, you need to download the data each time the information you originally downloaded changes in CDOL.

CHURCH DIRECTORY
of ORGANIZATIONS AND LEADERS

3. Editing Information in CDOL

This chapter explains the procedures for adding and updating organization and leader information in CDOL. It includes step-by-step instructions for the most common data entry procedures.

Chapter 3 Contents

Understanding the Event Model

What is an event?

An event is any occurrence in the life of an organization that requires prior approval by the First Presidency. These events include creation, name changes, discontinuation, realignments, transfers, and divisions. Events apply to both organizations and leaders.

Fields for an organization that are controlled by an event will appear shaded indicating you are not able to change the field.

Make it a habit to check the **Pending Events** tab when you sign on to CDOL.

Approval of Events

In general, all events require First Presidency approval. However, some changes for mission branches may be approved by the Area Presidency. Approved events display in the **Pending Events** tab.

Understanding Pending Events

CDOL is used by Church leaders (ecclesiastical and temporal) worldwide, and they depend on a directory that is current and accurate. New organizations and leaders do not appear in CDOL until you act on pending events. In order to have an up-to-date and accurate directory, make sure you check for pending events each time you sign on to CDOL.

Pending Events

Approved events appear in the **Pending Events** tab. If an event does not appear in the list, it has not yet been approved or submitted for processing by the stake or mission president.

A **Pending Event** is an event such as the creation of a new ward that is ready to be implemented. When an event is implemented, an active date is entered into CDOL and the organization becomes active.

With an active organization, you can add or update the information in each of the other tabs displayed on the **Edit Organization** screen.
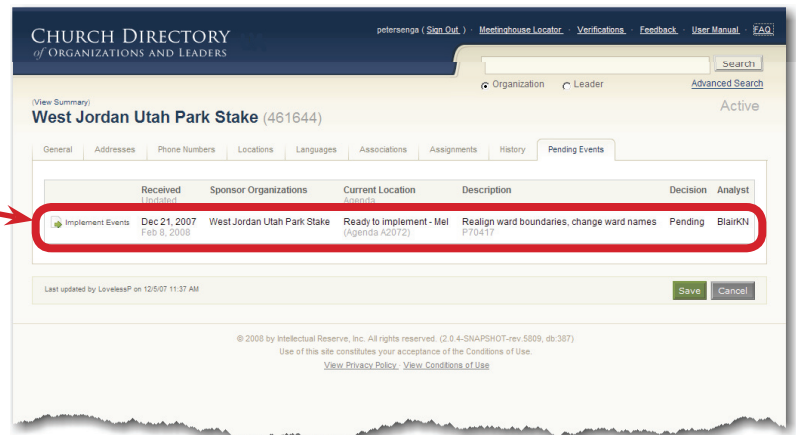
Activating a New Unit

Before you can add or update any information for a new organization in CDOL, complete the steps below to activate the organization. When you already know the unit has a pending event, you can begin with Step 5 below and complete the remaining procedures.

Each day, complete the following tasks to identify and then activate new units:

1 From the main CDOL screen, click your pending unit saved search to identify pending units. (If you have not created a saved search to identify pending units, follow the procedures found page 2-7.)

2 From Search Results, click **Edit** next to the unit name. The **Edit Organization** screen for the unit opens..

3 Click the **Pending Events** tab. The **Pending Events** tab opens and displays events you can implement..

4 Click **Implement Events**.
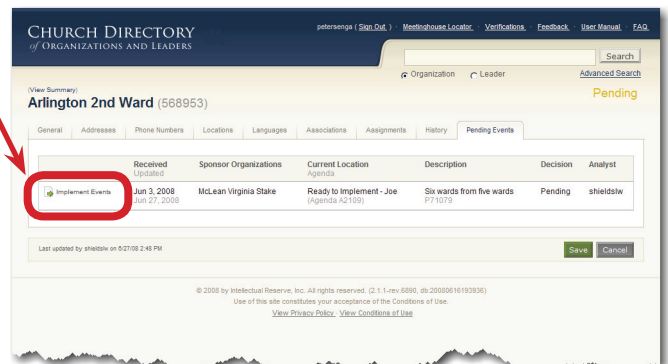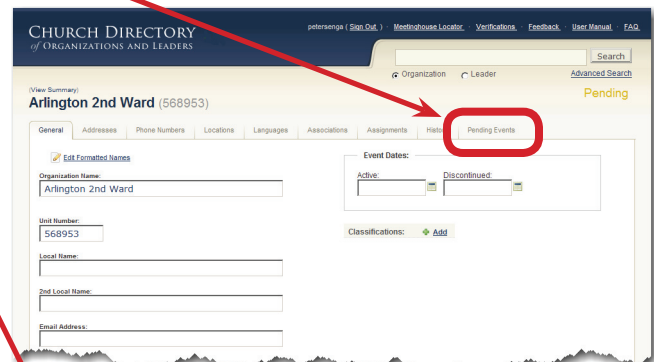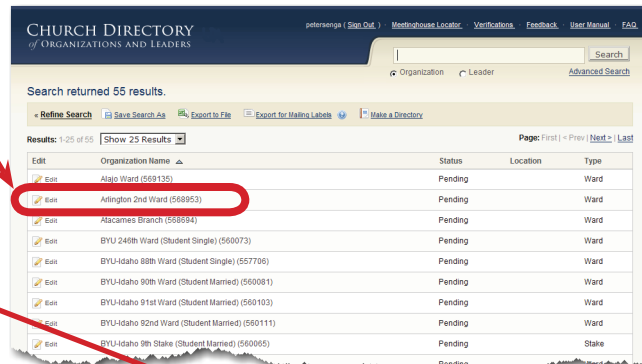
Activating a New Unit (continued)

5 A new window opens displaying a list of events that are ready to implement. Click the check box by each event you want to implement, or click the check box at the top to select all events.

6 Enter the **Effective Date** in the **Effective Date** field at the bottom of the screen.

7 Click **Implement Checked Events**.

When you return to the **Edit Organization** screen for the new unit, the **Active Date** field displays the date you entered. You are now ready to add or update the contact information and other information for the new unit.

Adding and Updating Organization Contact Information

After an organization has been activated, follow these steps to add and update the organization contact information to help keep CDOL accurate.

For each organization, contact information is displayed in the first three tabs: **General**, **Addresses**, and **Phone Numbers**. It is important that this information be current and accurate to enable efficient administration in the worldwide Church.

General

The **General** tab allows you to update the local name and e-mail address.

To update the Local Name:

1 Enter a new name in the **Local Name** or **2nd Local Name** in another character set.

2 Click **Save**.

To update the E-mail Address:

1 Enter the new e-mail address in the **E-mail Address** field. The organization e-mail address must be an LDS mail domain, such as *name@ldsmail.net.*

2 Click **Save**.

Click **Save** to save your changes.

ⓘ Local Names

Local names are helpful to show the organization name as it appears in the language of the unit instead of English. When you enter a local name, use a character set that allows you to enter the appropriate characters used in the organization's primary language.

E-mail
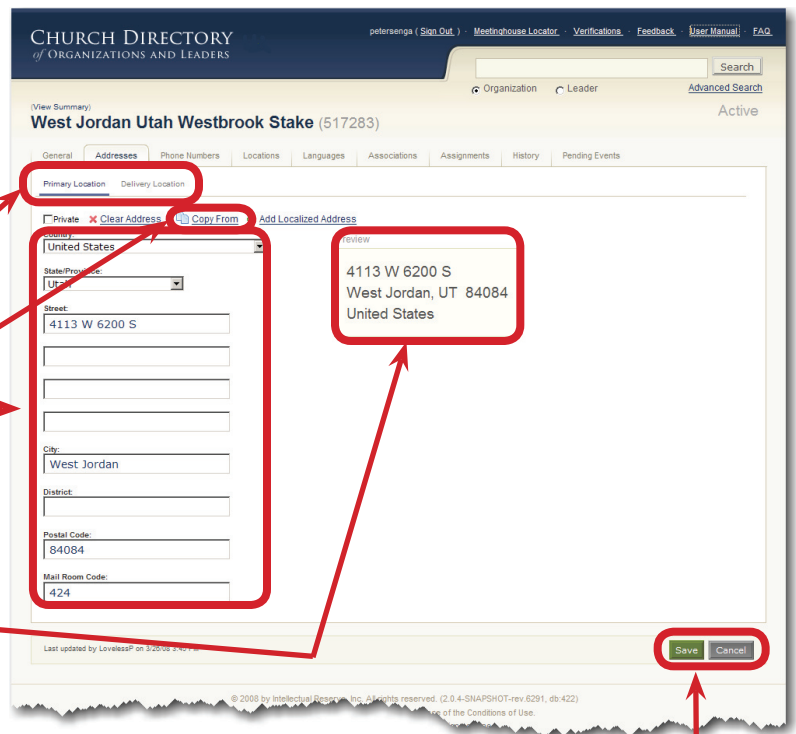
When you click an e-mail address in CDOL, it opens your default e-mail client and places the selected e-mail address in the "To" field.

Addresses

The **Addresses** tab allows you to add or update the organization's address. To do so, follow these steps:

1 Click one of the available locations shown (for example, **Primary Location** or **Delivery Location**.

2 Click **Copy From** [Copy From] to copy the address from another location including CMIS, or you may enter the address in the **Address** fields. In either case, you need to select the country from the drop-down list.

3 View your changes in the **Preview** window.

4 Click **Save**.
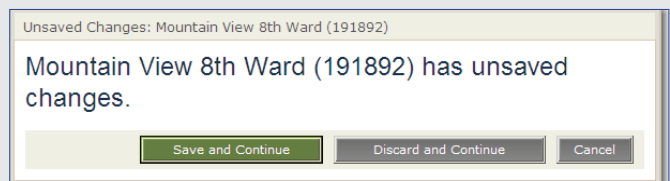
Click **Save** to save your changes.

Unsaved Changes   *Mountain View 8th Ward (191892)
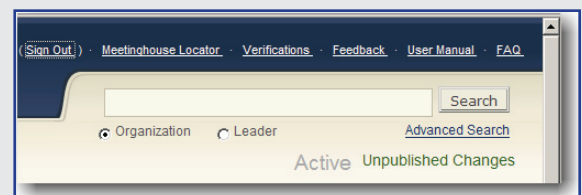
A red star next to the name of the organization or leader means an unsaved change has been made to the directory. Once the change has been saved, the star disappears.

If you try to move to another screen without saving or canceling changes you have made, the following message appears:

Unpublished Changes

When you make changes and then save them, the message "Unpublished Changes" appears in the upper right part of the screen. This message remains until the changes have been verified for publishing in the directory. For more information on verifying information, see Chapter 6 in this manual.
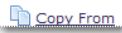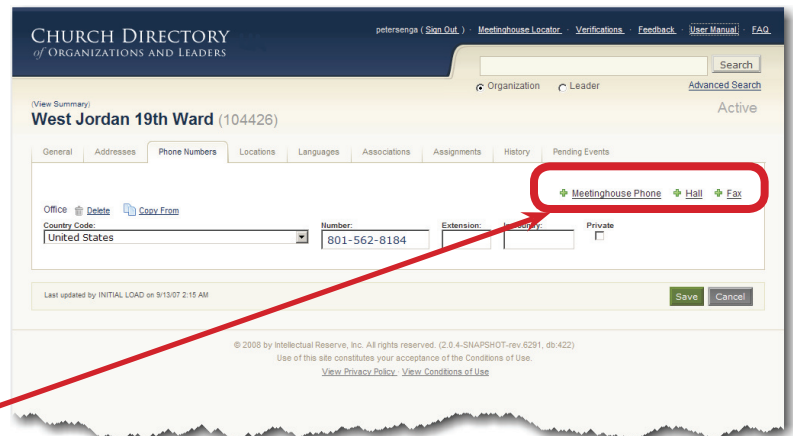
Phone Numbers

The **Phone Numbers** tab allows you to add or update an organization's phone numbers.

To change an organization's phone number:

1 Click **Copy From** [Copy From] to copy the correct number from another place in the directory, or enter the correct number in the correct **Phone Number** field.
2 Click **Save**.

To add a an organization's phone number:

1 Click the type of phone number you want to add.
2 Click **Copy From** to copy the phone number from another place in the directory, or enter the new phone number including the area code and any extension or in-country code in the proper fields. Do not repeat the country code in the phone number.
3 Click **Save**.

Click **Save** to save your changes.

3-8

Updating Organization Locations and Languages

Follow these instructions to add or update organization location and language information.

The **Locations** and **Languages** tabs allow only limited edits.

Locations

The **Locations** tab allows you to change the organization's time zone and add a new location.

To change the time zone:
1 From the dropdown list select the correct time zone.
2 Click **Save**.

To add a new location:
1 Click **Add** and select a new location from the dropdown list.
2 Click **Save**.

Languages

The **Languages** tab displays the organization's spoken and materials languages. To add a new language:
1 Click **Add** to add a new spoken materials language.
2 Select the new language from the dropdown list.
3 Click **Save**.
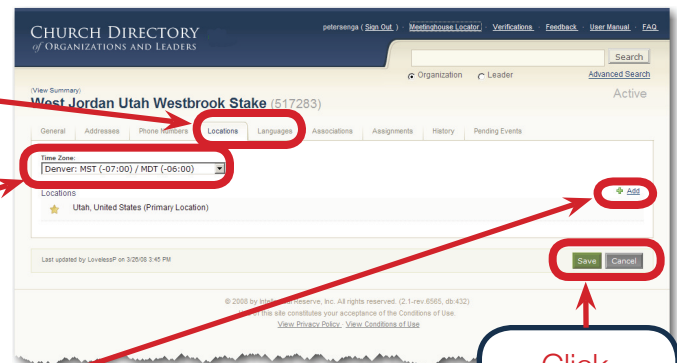
Click **Save** to save your changes.
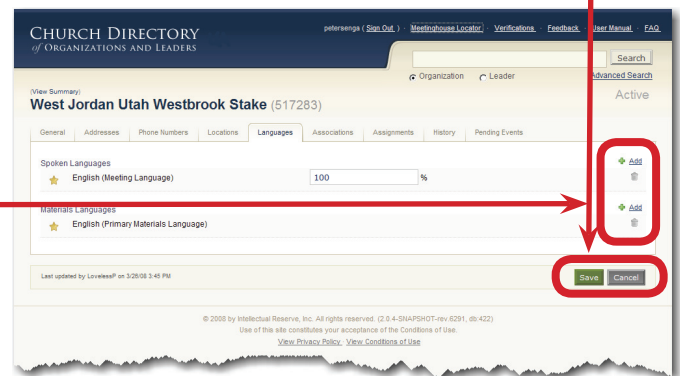
Time Zones

To choose a time zone, select the city from the list that is in the correct time zone for the locality you are editing. The time zone abbreviation is listed after the name of the city. The UTC (Coordinated Universal Time) for that time zone is listed in parentheses. For example, Denver is in the Mountain Time Zone and uses Mountain Standard Time (MST) or Mountain Daylight Time (MDT). UTC is listed as (-7:00) for MST and (-6:00) for MDT.

Locations and Languages

The Church uses Master Data Management (MDM) to maintain consistency in its various databases. The MDM maintains the locations and languages for CDOL.

Releasing a Leader

To help keep the directory accurate, follow these steps to release a leader from an assignment.

Whether the leader is a priesthood leader or a manager over Church employees, the procedure is the same.

To release a leader:

1 Enter the unit number in the **Search** field and click **Search**. A new window displays the ward's summary information.

2 Click **Edit Organization**. The Edit window displays several tabs across the top.

3 Click the **Assignments** tab. The Assignments window displays.

4 Click **Release** in the Actions column for the leader you want to release. A new window opens with several data entry fields.

5 Enter the released date in the **Released Date** field. (You may skip the **Released Reason** field.)

6 Enter the Membership Number for the new leader in the **Lookup Person** field, and the date the new leader was set apart in the **Date Set Apart** field.

7 Click **OK**.

> Don't click the **Save** button yet!

A new window opens where you enter information about the new leader.

Adding a New Leader

To help keep the directory accurate, follow these steps to add a leader to an assignment.

Whether the leader is a priesthood leader or a manager over Church employees, the procedure is the same.

To add a new leader:

Make sure the current leader has been released. (See *Releasing a Leader* procedures on page 3-10.)

1 Enter the unit number in the **Search** field and click **Search**. A new window displays the ward's summary information.

2 Click **Edit Organization**. The Edit window displays several tabs across the top.

3 Click the **Assignments** tab. The Assignments window displays.

4 Click **Add New Assignment**. A new window opens with two data entry fields.

5 Click the arrow to open the window in the **Select Assignment** field and select the assignment.

6 Enter the Membership Number in the **Lookup Person** field, and click **OK**.

Don't click the **Save** button yet!

A new window opens where you enter or update information about the new leader.

Updating Leader Information

Follow these steps to update leader information including leader contact information.

After you release a leader or add a new leader, the **Edit Assignment** window opens. Here you can update the new leader's information. Select the tabs that have the data entry fields you need to update. Follow these steps:

1 The first tab displays the name of the assignment such as *Bishop* or *Bishopric First Counselor*. Update the new leader's name and E-mail address.

2 Click the **Ecclesiastical** tab. Click **Edit Set Apart**. Enter the set apart date in the **Date Set Apart** field (if not already entered). Click **Select Person** in the **Set Apart By** field. A new window opens where you select the person who set the new leader apart.

3 Select or enter the membership number or name of the leader who set the new leader apart and click **OK**. The **Ecclesiastical** tab displays with your selection.

4 *If needed*, click **Edit Ordination** and enter the ordination date in the **Date Ordained** field. Click **Select Person** in the **Ordained By** field. A new window opens where you select the person who ordained the new leader. Repeat the procedures in Step 3 and click **OK**. The Ecclesiastical tab displays the updated information.

5 Click the **Addresses** tab. The **Addresses** tab displays. Select the type of address you want to update. Home Address is the default.

6 Click **Copy From**. A new window opens. From the **Church Record (CMIS) Addresses** dropdown list, copy the new leader's Church Record in CMIS and click **OK**.

Don't click the **Save** button yet!

You return to the **Addresses** tab.

7 Click the **Phone Numbers** tab. From the list of available types of phone numbers click **Home**. The **Phone Number** fields display. Enter the complete phone number, including the area code, any extension, and the in-country code, if used.

Three other tabs are optional.

From **Other Assignments** you can view previous assignments for the new leader (if they are included in the directory). This tab has read-only information.

From **Languages** you can click Add to add an additional language spoken by the new leader. Click **OK**.

From **Notes** you can click **Add** to add a note about the new assignment. Click **OK**.

8 To save the information you entered for the new leader click **Save**. The updated information should display in the directory within 24 hours.

Updating Leader Information

After you enter or update information remember to click **OK** to save the information. When you have finished all editing for a new leader, click **Save** to make sure all your changes are saved.

CHURCH DIRECTORY
of ORGANIZATIONS AND LEADERS

4. Creating Reports and Directories

This chapter explains how to create reports and personal directories in CDOL.

Chapter 4 Contents
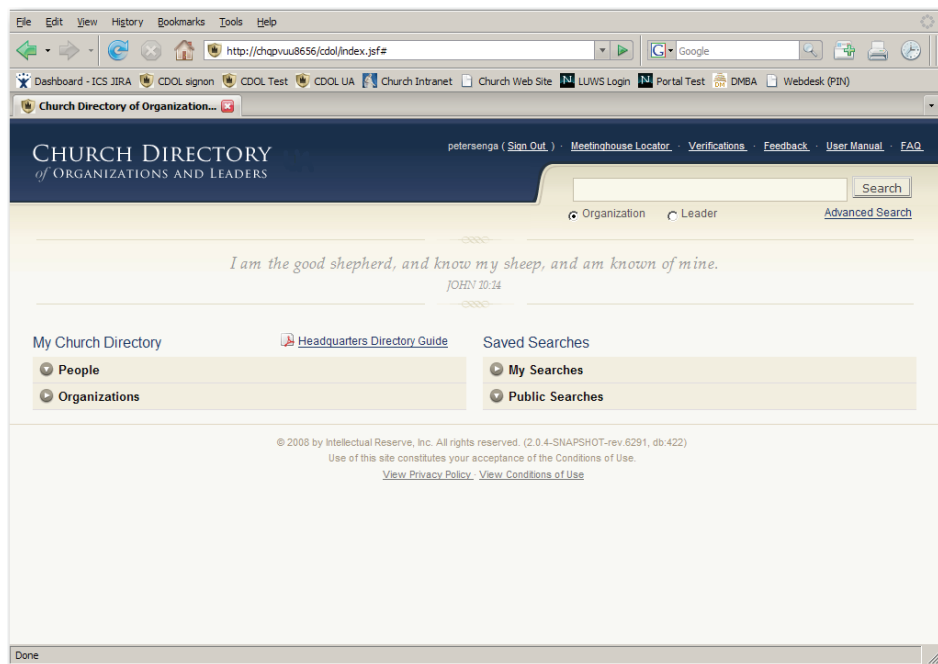
Creating Reports from Advanced Search Option

You may want to create reports with information from organizations that meet specific criteria. In CDOL you can use the **Advanced Search** option to create reports and lists that meet your criteria. The following example illustrates the procedures:

To create a report using Advanced Search click **Advanced Search** on the main CDOL screen and select from the following criteria:
- **Keyword(s)** - You can enter a keyword.
- **Search Type** - Select **Position**, **Organization**, or **Church Department** to identify the type of search you want to complete. (For this example we selected Organization.)

Depending on the Search Type you select, you can select:
- **Organization Type** - Select from a list of organizations such as Ward. (In this example we selected Branch.)
- **Position Type** - Select from a list of positions siuch as bishop.
- **Church Department** - Select from a list of Church departments.

- **Classification** - Select a classification from the dropdown list such as Care Center or Supports Military. (In this example we selected Care Center.)

Creating Reports from Advanced Search Option (continued)

- **Status** and **Date** - Select the status of the organization. (In this example we selected care center branches that became active between 1 July 2007 and 1 July 2008.)

Other criteria you may include are:
- **Language** - Select the language from the dropdown list.

- **Church Location** - Select the location from the dropdown list. Here we select **Area** and then select **Europe Central Area**, **Europe East Area**, and **Europe West Area**.

- **Political Location** - Here you can narrow the political location to a specific country or state.

- **Property Number** and **Property Address** - Here you can enter specific information about the property you want to look for.

After entering your criteria, click **Search**.

The **Search Results** screen displays the organizations that meet the criteria we selected. Click the links to:
- **Export to File** - See page 2-3 for procedures to **Export to File**.
- **Export for Mailing Labels** - See page 4-7 for procedures to **Export for Mailing Labels**.
- **Make a Directory** - See page 4-4 for procedures to **Make a Directory**.

Making a Directory

At times you may want to have a directory of all organizations or leaders in a specific location. CDOL has a template that guides you through this process. The Make a Directory template allows you to create a custom directory.

To start the process, click **Make a Directory** on a **Search Results** screen or on the **Unit Summary Page** or **Leader Summary Page** for an organization or leader.
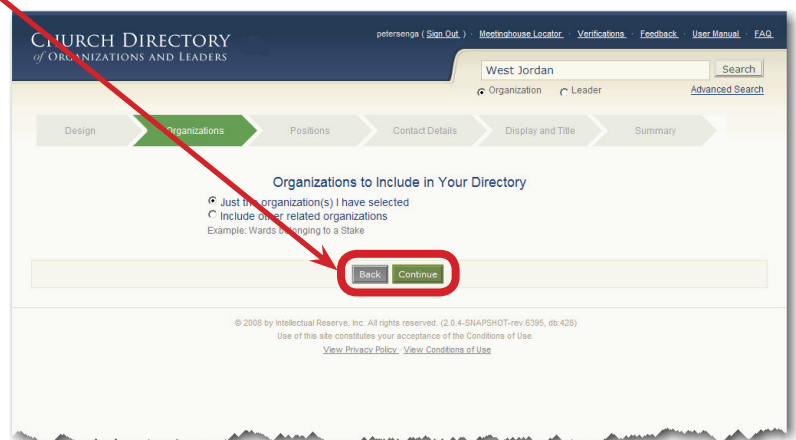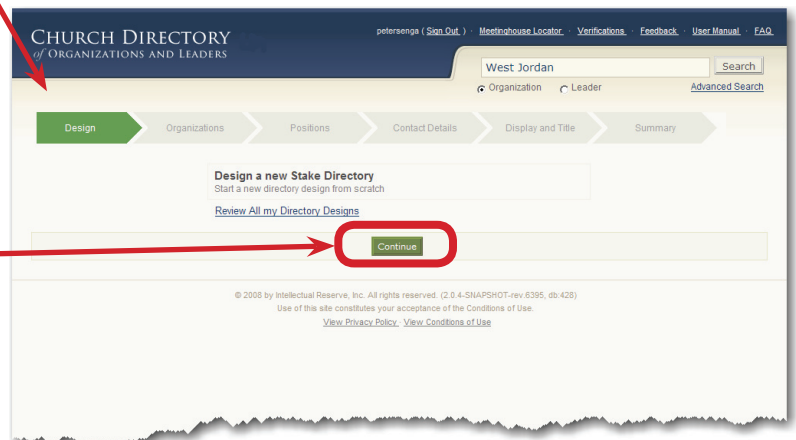
The **Make a Directory** template opens. In this example, we will make a new stake directory.
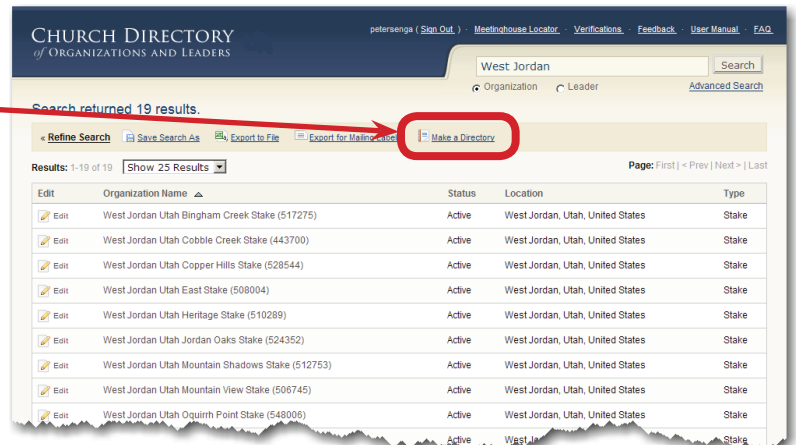
Follow these steps:

1 Design
   To design a new directory, click **Continue**.

2 Organizations
   Select the Organizations to include. Click **Continue.**

3 Positions

From the dropdown list, select the positions you want to display in the directory.

For example, the Primary Contact is a stake president in a stake and a bishop in a ward. Key Positions are the positions that provide leadership to a unit and normally consist of stake presidencies and bishoprics (including clerks).

After you make a selection click **Continue**.

4 Contact Details

From each category select the phone numbers and addresses you want to include in the directory.

After you make a selection click **Continue**.

Making a Directory (continued)

5 Display and Title

Select the sort order for the directory, decide on a one- or two-column layout, and select either official or local names. Add a title and description for the directory.

Click **Continue**.

6 Summary

This screen displays a summary of the directory design. From this point you can:
- Print the directory
- Save the directory design
- Go back to change the criteria, or
- Return to the search results and start over.

The **Make a Directory** template produces a document in Adobe ®Acrobat (.PDF) format. The document can be printed and saved on your computer.

An example of the directory using the criteria from the example appears to the right.

Creating Mailing Labels

You can create mailing labels from the **Search Results** screen in CDOL. Follow these steps.

To create mailing labels:

1 From the **Search Results** screen click **Export for Mailing Labels**. (A new window opens showing that your request is being processed.) When the export is complete a new window appears. The window that opens depends on the Web browser you are using.

2 Indicate what you want to do with the file: Click **Open**, **Save**, or **Cancel**. (In this example, we clicked **Open**.)

The results display in a spreadsheet format and can be used with the mail merge options in your word processing application to create and print labels.)

Mailing Labels

For help in creating and printing labels in Excel go to Excel Help and search for *mailing labels*, or go to http://office.microsoft.com/en-us/excel/default.aspx and search for *create mailing labels*. Note that mailing label files are currently in English only. Export file gives local language for unit and leader name.

5. Frequently Asked Questions

The following questions are those most frequently asked about CDOL and its operations. They should help you in your initial troubleshooting efforts.

If you encounter problems that are not addressed here, click the Feedback link on the main CDOL screen and describe the nature of your problem. You may also e-mail a description of your problem to Jana H. Nytch at **nytchjh@ldschurch.org** or Rick Partridge at **partridgerm@ldschurch.org**.

General CDOL Navigation

Q: Why does using the Internet browser's back button cause problems in CDOL?

A: When you go to a CDOL page, large amounts of data are loaded on the page and its tabs. When you use the browser's back button, many of the data elements are not currently active and may not reload. You therefore see erroneous data on the screen. To be safe, always use the links within CDOL to navigate.

Organizations

Q: Why is it important to add contact information before I make an assignment active?

A: Once a position becomes active and the information is verified, many departments of the Church receive this information. They are affected if there is a lack of contact information. Financial accounts, missionary recommendation, and system mail are some examples of systems that need this information to be present.

Q: What is the difference between organizational e-mail and personal e-mail?

A: Organizational e-mail stays with the life of the organization. Domestically, any unit that receives financial statements will use organizational e-mail to receive official statements. All organizational e-mail must be on Church-hosted e-mail services to avoid conflict of ownership of the e-mail content.

Q: What in CDOL has changed about organization names?

A: Formerly, the organization type was appended to the name. For instance, the name Crescent 14th was of the type "ward." In order to avoid confusion and allow for ease in localizing the name, the name is now "Crescent 14th Ward" and still has the type of "ward."

CDOL now also allows the user to enter a localized name and address for all units.

Q: How do localized names get into the CDOL database?

A: The localized names for all units in the AOCDS database will be imported into the new CDOL database structure. You can also add localized names as you use the system. They will then flow back into the AOCDS table structure and CMIS.

Leaders

Q: What if I find something wrong with the historical leadership information listed for a unit?

A: Historical leadership was entered from a variety of sources. Sometimes historical leadership information was incomplete or had conflicting information. Historical leadership data correction and additional information are encouraged. Please send your suggestions through the feedback link in CDOL or send an e-mail to OIServices@ldschurch.org.

Q: When I am putting a person into a position in CDOL, why can't I search and find the person by name? Why do I have to use the person's membership number?

A: In order to provide data privacy for the members of the Church, a search by name was not possible. Please search by the membership number.

Q: What are "acting leader" positions, and when are they used in CDOL?

A: The First Presidency's Office has instructed MSR Church Organization Services to use acting leader positions only in active units as short-term solutions when a leader is actively being considered. To comply with these instructions, the MSR staff at Church headquarters is responsible for entering all acting leader information in CDOL after determining that the request meets these new guidelines. The MSR staff at Church headquarters will also closely monitor all acting leader positions in CDOL and will follow up with MSR managers as needed.

An "acting leader" position is used for cases where the leader has passed away, moved, or can no longer lead the unit. For example, in an "acting ward leader" position the stake president usually appoints a high councilor or himself to take care of the unit. The original bishop is left in the calling and his counselors continue to function, but in CDOL the primary-contact star is removed from the bishop's name and put on the acting bishop's name.

The "acting ward leader" position is not used when a bishop is called to the stake presidency in some capacity. He remains as bishop until the stake president recommends and receives First Presidency approval for a new bishop to fill the position.

The "acting branch leader" is used in cases where a missionary is serving in a branch president's position while on a mission. An "acting branch leader" position filled by a missionary does not require a setting apart date or the day he actively begins serving. In CDOL, if the name of the missionary is not available, the mission president is normally entered in the position, although it can be filled by a district president.

Permissions

Q: How do I give a person access or different rights in the CDOL system?

A: Access to the CDOL system is largely determined by the position that an individual occupies in the system. As an individual's position in the system changes, it will automatically grant or remove access privileges. As a new person is assigned to a position, the correct CDOL rights are automatically granted.

There are also some rights that are assigned to individuals.

Frequently Asked Questions (continued)

Q: Why can't I update directory information for missions?

A: The Missionary Department is the data steward for missions and has the responsibility to edit and maintain all mission information. Any requests for changes related to missions should be forwarded to Teresa Elwood in the Missionary Department (elwoodta@ldschurch.org).

Q: One of my personal directories disappeared. Why?

A: Your rights have changed and you no longer have access to view that information.

Q: Why can't I add a bishop or stake presidency counselor to a ward or stake?

A: Approval for bishops and stake presidency counselors is granted by the First Presidency. If you try to put in an individual into one of these callings and they are not listed as approved to serve in that unit, the system will prevent the data entry and ask that you contact your Area Office or the Office of the First Presidency to resolve the matter.

Q: How do I assign someone to verification duty?

A: All verification rights are assigned by headquarters. The local MSR manager submits the names of individuals to Jana H. Nytch (Church Organization Services) at Church headquarters to get the proper rights assigned.

Verifications

Q: What does the message "Unpublished Changes" mean on the organization summary screen?

A: Whenever changes are made to an organization or any of its assignments, staff members verify that the changes are correct and make adjustments as necessary. These changes will not show up on the summary screen until this verification has occurred.

Q: When I type information into CDOL, why doesn't it immediately show up in CDOL?

A: In order to maintain the highest data quality possible, all changes made to designated organizations require verification after the original data entry. The responsibility to verify data is assigned to designated individuals.

Once the information is verified, it is published into the database views. Management assigns verification duties. Please check with your management to see who has this duty.

Q: What are business rules?

A: Business rules control publication of data. All required information must be present to publish. This information will be displayed on the edit screens and verification screens to inform the user of needed tasks.